

U.S. DEPARTMENT OF EDUCATION

Federal Student Aid



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Experimental Sites Initiative Annual Reporting Tool User Guide

Version 6.3

September 7, 2008

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1. Introduction

Federal Student Aid, an office of the U.S. Department of Education, ensures that all eligible individuals benefit from federal financial assistance—grants, loans and work-study programs—for education beyond high school. By championing the promise of postsecondary education, we uphold its value as a force for greater inclusion in American society and for the continued vitality of America as a nation.

The U.S. Department of Education, Federal Student Aid introduced the online annual reporting tool for the Experimental Sites Initiative in December 2003. All participating schools are required to use the online tool to complete and submit their annual reports. This guide will discuss the reporting requirements, and how to use the online reporting tool to report current award year data and to access prior year reports.

2. Reporting Period

Participants will use the online reporting tool to complete and submit their annual reports. Your annual report must be submitted by November 19.

3. Accessing the Experimental Sites Annual Reporting Tool

To access and use the online reporting tool, you must have a web browser and access to the Internet. You can access the Experimental Sites Annual Reporting Tool from the Experimental Sites home page at <http://ExperimentalSites.ed.gov>. Once the Experimental Sites home page has loaded, click the “Annual Reporting Tool” link and then select the “Login” link from the submenu.

3.1 Browser Requirements

The Experimental Sites Annual Reporting Tool has been tested using Internet Explorer 6.0. It is recommended that you use Internet Explorer when using the Annual Reporting Tool. Visitors using other browsers may experience problems when using the Annual Reporting Tool. The browser you use must support JavaScript.

4. Authorized Users

Each school using the Experimental Sites Annual Reporting Tool has two types of users: School Coordinators and School Users. Prior to using the Experimental Sites Annual Reporting Tool, a user must complete the online self-registration process described in Section 5. This process ensures that only authorized people have the ability to use the Experimental Sites Annual Reporting Tool.

4.1 School Coordinators

Each school participating in the Experimental Sites Initiative has one user that is designated as a School Coordinator. A School Coordinator is responsible for approving all user account requests for their school. School Coordinators also have the ability to revoke a user’s access to the Experimental Sites Annual Reporting Tool at any time. See Sections 5.2 and 5.3 for more information.

School Coordinators must register with Experimental Sites in order to perform these tasks. Section 5.1 describes the process that School Coordinators use to register. The School Coordinator’s access request will then be reviewed and approved by the Experimental Sites Team (Warren Farr, 202-377-4380). School Coordinators will receive an e-mail message once their

request has been approved. School Coordinators also have the same capabilities as approved School Users, as described in the next section.

4.2 School Users

School Users use the Experimental Sites Annual Reporting Tool to submit their school's annual Experimental Sites Report. Before a School User can access the Experimental Sites Annual Reporting Tool, they must register (as described in Section 5) and their school's designated School Coordinator must approve their request (as described in Section 5.2).

School Users cannot register until a School Coordinator has registered for their school. If a user attempts to register prior to their School Coordinator registering, they will not be allowed to complete the registration process and they will be asked to register after their School Coordinator has registered.

5. Registration

User registration is now performed online through a self-registration process provided by Federal Student Aid Security Architecture (SA). Faxing a paper application is no longer required. SA provides a simplified sign-on process that gives one account the ability to access multiple systems. For example, users who have registered with Experimental Sites and the e-Campus Based System can use the same account to access both systems.

New users and users with an existing SA account use the following process. The registration process starts on the Experimental Sites home page (see Section 3). From the home page, click the "Annual Reporting Tool" menu option followed by the "Login" menu option. The Experimental Sites Login screen will load (see Figure 1).

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[Forgot Password](#)
[Change Password](#)
[Registration](#)
[Experimental Sites School Coordinator and SSO Admin functions](#)
[Edit My Account](#)
[Registration Help Files](#)

Login to Access Requested Page

UserID:
Password:

US

The virtual keyboard can be used in conjunction with your keyboard. The value of the key will be entered by clicking on a key or when the cursor is over the key for 2 seconds.

This is a U.S. Federal Government owned computer system, for the use by authorized users only. Unauthorized access violates Title 18, U.S. Code Section 1030 and other applicable statutes. Violations are punishable by civil and criminal penalties. Use of this system implies consent to have all activities on this system monitored and recorded, which can be provided as evidence to law enforcement officials.

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Figure 1 – Login Screen

From the login screen, click the “Registration” link found in the left navigation menu, third from the top. This loads the “Confirming Your Identity” screen (see Figure 2).

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[Return to Login](#)

Confirming Your Identity

We need some personal information from you to create an identity. If you have an existing SA account, this will populate your registration forms with your current information. Please answer the following questions.

Existing Users : Enter information as it appears on your SA account or Participation Management (PM) record.

Your First Name*:

Your Last Name*:

Your Date of Birth (MMDDYYYY)*:

Last four digits of Social Security Number*:

Required fields are marked with an *

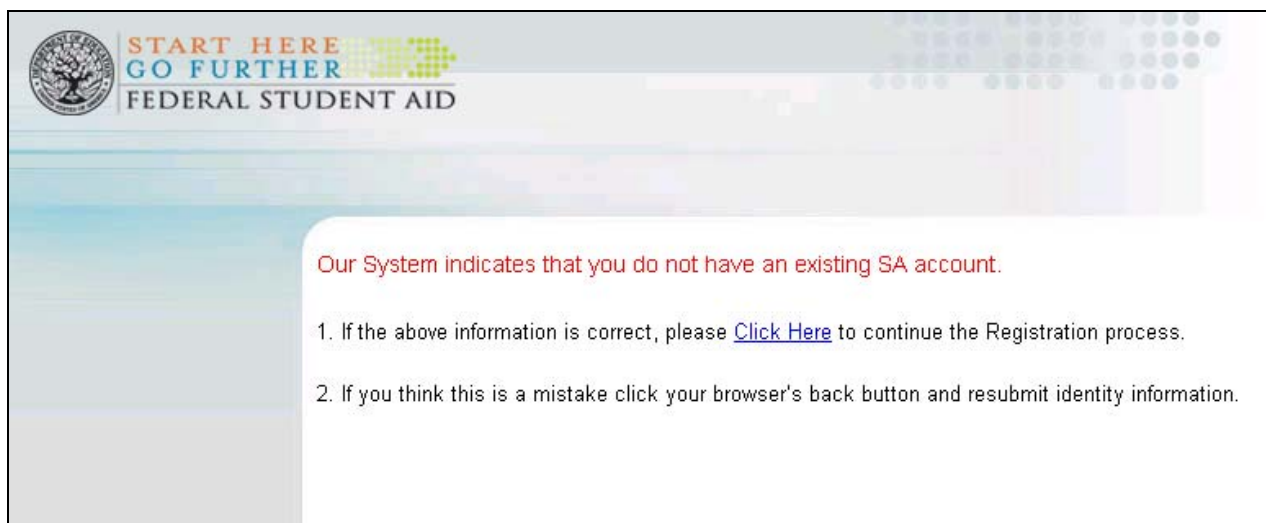
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Figure 2 – Confirming Your Identity Screen

The “Confirming Your Identity” screen is used to enter the four pieces of information that uniquely identify you from other Federal Student Aid SA users. Federal Student Aid uses this information to determine if you need to have a SA account created for you. If Federal Student Aid determines that you already have a SA account, Experimental Sites Annual Reporting Tool access will be added to your existing account.

Enter your first name, last name, date of birth in MMDDYYYY format (e.g. December 1, 1970 would be 12011970), and the last four digits of your Social Security Number. Click the “Submit” button after you have entered your information. The screen will display a message informing you as to whether or not you have a current SA account. Figure 3 shows the message displayed if no SA account is found.



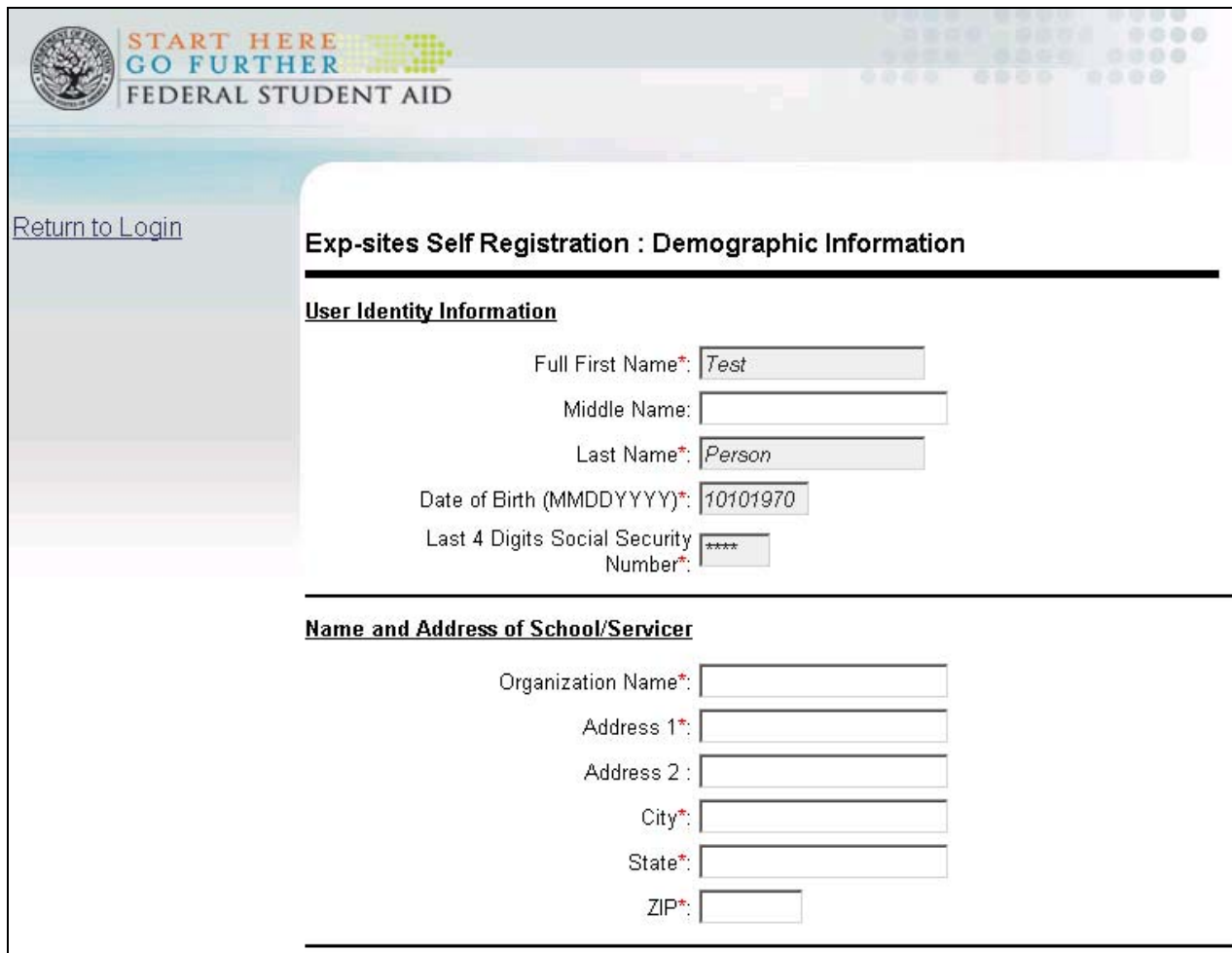
The screenshot shows the top header with the FSA logo and the text "START HERE GO FURTHER FEDERAL STUDENT AID". Below the header, a message in red text states: "Our System indicates that you do not have an existing SA account." Below this message, there are two numbered instructions:

1. If the above information is correct, please [Click Here](#) to continue the Registration process.
2. If you think this is a mistake click your browser's back button and resubmit identity information.

Figure 3 - No Security Architecture Account Found Screen

Use the "Click Here" link to continue with registration. Clicking the link will load the Demographic Information screen (Figures 4, 5 and 6).

If you have a valid SA account, the registration process will request that you login to continue registration. Once logged in, the Demographic Information screen will load.



The screenshot shows the "Exp-sites Self Registration : Demographic Information" screen. On the left, there is a link "Return to Login". The main content area is titled "Exp-sites Self Registration : Demographic Information" and contains two sections:

User Identity Information

Full First Name*:

Middle Name:

Last Name*:

Date of Birth (MMDDYYYY)*:

Last 4 Digits Social Security Number*:

Name and Address of School/Service

Organization Name*:

Address 1*:

Address 2:

City*:

State*:

ZIP*:

Figure 4 – Demographic Information Screen, part 1

Figure 4 shows the section of the Demographic Information screen where a requestor can view (but not change) their user identity information and enter their organization's name and address.

Figure 5 shows the section of the Demographic Information Screen where a requestor enters their work phone number, their work e-mail address, and their password. Password requirements are displayed on the screen.

The screenshot displays two sections of a web form. The first section, titled "Contact Information", contains three rows of input fields: "Work Phone Number*" with three separate boxes and a red asterisk, "Work Email Address*" with one box, and "Reenter Email Address*" with one box. The second section, titled "Security Architecture Password", contains a paragraph of password requirements, a list of three requirements, and two rows of input fields: "Password*" and "Reenter Password*", both with red asterisks.

Contact Information

Work Phone Number*: * * * Ext.

Work Email Address*:

Reenter Email Address*:

Security Architecture Password

Your password must be at least 8 characters long, contain at least 4 alpha characters, at least one numeric character and NOT contain any spaces. Your password must NOT contain any fragment (3 or more consecutive letters) of your First or Last Name. Your password must also include at least 2 of the following 3 character types:

- (1) Lower case alpha
- (2) Upper case ALPHA
- (3) Special

Password*:

Reenter Password*:

Figure 5 – Demographic Information Screen, part 2

Figure 6 shows the section of the Demographic Information screen where a requestor enters their supervisor's information and they set their challenge questions. Challenge questions are used to confirm the identity of a user in situations where the user has forgotten their password (see Section 6.2).

If you are registering and have an existing SA account, your challenge questions will have already been answered and thus the Challenge Questions section of the Demographic Information screen will not be displayed.

Supervisor Information

First and Last Name*:
Work Email Address*:
Reenter Email Address*:
Work Phone Number*: * * * Ext.


Challenge Questions

Choose Question #1*:
Answer for Question #1*:
Choose Question #2*:
Answer for Question #2*:
Choose Question #3*:
Answer for Question #3*:

Required fields are marked with an *

Figure 6 – Demographic Information Screen, part 3

After all demographic information has been entered, click the “Submit” button. If any errors are detected (i.e. required fields left blank, password not meeting requirements, etc), the screen will reload and display the error messages at the top of the page. After all errors have been corrected, re-click the “Submit” button. If no errors are detected, the School Selection screen loads (see Figure 7).



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[Return to Login](#)

Experimental Sites Self Registration : School Selection

Please enter the exact 8 DIGIT OPEID of the school you need to register for, and click Add. You can add only one school. If you do not know your school's 8 digit opeid, please click Search to search for schools.

Exact 8 digit OPEID*:

Selected School*:

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Figure 7 – School Selection Screen

The School Selection screen is used to pick the institution you are registering. Enter your school’s full 8 digit OPEID number and then click the ‘Add’ button. If the school you entered is participating in the Experimental Sites Initiative, the school’s name will be loaded (see Figure 9). If you enter an incorrect OPEID number, or the OPEID number of a school not participating in the Experimental Sites Initiative, a warning message will be displayed.

If you do not know your school's OPEID number, click the "Search" button. This will load the School Search screen (see Figure 8).

The screenshot shows the 'Experimental Sites Self Registration : School Search' page. At the top left is the 'START HERE GO FURTHER FEDERAL STUDENT AID' logo. A 'Return to Login' link is on the left. The main heading is 'Experimental Sites Self Registration : School Search'. Below it, a prompt asks the user to define search criteria using OPEID or School Name, noting that wild card characters are not needed. There are two input fields: 'Search schools with OPEID like:' and 'School Name like:'. To the right of the OPEID field is an 'OR' label. Below the fields are 'SEARCH' and 'CLEAR' buttons. The 'Search Results' section shows a list of schools with OPEID and names: 09999100 Test School One, 09999200 Test School Two, 09999300 Test School Three (highlighted), 09999400 Test School Four, and 09999500 Test School Five. At the bottom are 'PREVIOUS', 'SUBMIT', and 'CANCEL' buttons. A note states 'Required fields are marked with an *'. The footer contains links for FOIA, Privacy, Security, and Notices, and the websites whitehouse.gov, usa.gov, and ed.gov.

Experimental Sites Self Registration : School Search

Please define a school search criteria using any or all of the following (Wild card characters like * or % are not needed.):*

Search schools with OPEID like: OR
School Name like:

SEARCH **CLEAR**

Search Results

OPEID School Name

09999100	Test School One
09999200	Test School Two
09999300	Test School Three
09999400	Test School Four
09999500	Test School Five

PREVIOUS **SUBMIT** **CANCEL**

Required fields are marked with an *

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Figure 8 – School Search Screen

You can use the School Search screen to search for your institution using a partial OPEID number and/or partial school name. For example, if your school's OPEID number was 09999200, you could search using 99. All schools with 99 in their OPEID number would then be displayed in the Search Results box towards the bottom of the page. Select your school from the list of search results or conduct a new search using different criteria.

Once you have found the correct school, click the "Submit" button. The School Selection screen, with the information about the school you picked, will load (see Figure 9).

Experimental Sites Self Registration : School Selection

Please enter the exact 8 DIGIT OPEID of the school you need to register for, and click Add. You can add only one school. If you do not know your school's 8 digit opeid, please click Search to search for schools.

Exact 8 digit OPEID*: **ADD** **SEARCH**

Selected School*:

☐ Check this box if you are registering as a School Coordinator.

School OPEID : 09999100
School Name : Test School One
School Location : 830 First Street **REMOVE**
City : Wasington
State : DC
ZIP : 356111999

PREVIOUS **SUBMIT** **CANCEL**

Required fields are marked with an *

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Figure 9 – School Selection Screen with Selected School Displayed

Figure 9 shows the school to which you are requesting access. If it is the incorrect school, click the “Remove” button. This removes the selected school and allows you to add or search for a new school as described above. If you try to add or search for a second school, you will receive an error message stating that you can only register for access for one school. If you have problems locating your school, please contact the Experimental Sites Team (Warren Farr, 202-377-4380).

If the correct school is displayed, click the “Submit” button. The Confirm Entered Information screen loads. This screen displays the information entered during the registration process. If any information is incorrect, the “Modify” button can be used to correct the information.

The Confirm Entered Information screen also contains the Experimental Sites Annual Reporting Tool’s rules of behavior (see Figure 10). To register, you must read the rules of behavior and select the acknowledgement check box. This indicates that you have read and agree to follow the rules of behavior.

As a **School User** of the Experimental Sites Annual Reporting Tool (Experimental Sites), I agree to:

- Follow all operational instructions provided in the Experimental Sites User Guide;
- Never share my Experimental Sites user ID and/or password with anyone else under any circumstance
- Either log off Experimental Sites or lock my workstation if I am logged into Experimental Sites and must leave my workstation
- When finished using Experimental Sites, I will log off from the application
- Inform the Experimental Sites Application Administrator in the event of any suspected or actual unauthorized use of Experimental Sites

As a **School Coordinator** for a school participating in the Experimental Sites Initiative, I agree to

- Inform the Experimental Sites Application Administrator of any user changes (i.e. adding or removing Authorized School Users), including a change in School Coordinator;
- Inform the Experimental Sites Application Administrator in the event of any suspected or actual unauthorized use of Experimental Sites

I understand that failure to abide by these rules of behavior may result in losing access to Experimental Sites

☐ I hereby acknowledge that I understand and agree to the Experimental Sites Rules of Behavior

SUBMIT **CANCEL**

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Figure 10 – Confirm Entered Information Screen, Rules of Behavior section

If everything is correct, click the “Submit” button. This submits your registration request to the school coordinator from the school you selected during the registration process. After the school coordinator has approved your request, you will receive an e-mail confirming your registration and a second e-mail containing your new SA User ID.

Note: Before registering as a school user, your school must have a registered school coordinator. If you attempt to register for a school that does not have a school coordinator, you will receive an error message. Section 5.1 provides more information on school coordinator registration.

5.1 School Coordinator Registration

The registration process for School Coordinators is almost identical to the process listed above, though there are three key differences.

First, after adding or searching for your school, you must check the checkbox labeled ‘Check this box if you are registering as a School Coordinator’ to register as a school coordinator (see Figure 9).

Second, registration requests from school coordinators are approved by the Experimental Sites Team. You will still receive an e-mail after your registration request has been approved and the second e-mail containing your new SA User ID.

Finally, you will receive an error message if you attempt to register as a school coordinator for a school that already has a registered school coordinator. If you receive this error message and believe this is in error, contact the Experimental Sites Team (Warren Farr, 202-377-4380).

5.2 Approving School User Access Requests

School Coordinators are responsible for approving/rejecting School User requests for their school. This process begins when the School Coordinator receives an e-mail informing them of a new request. To process the request, the School Coordinator must login to the Manage Users module. This begins by going to the Experimental Sites login screen (see Figure 1). Once on the login screen, click the 'Experimental Sites School Coordinator and SSO Admin Functions' link. This will load the School Coordinator Login screen (see figure 11).

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[Forgot Password](#)
[Change Password](#)
[Edit My Account](#)
[Registration Help Files](#)

Experimental Sites SC and SSO functions

UserID:
Password:

US

Tab q w e r t y u i o p [] \
Caps a s d f g h j k l ; ' Enter
Shift z x c v b n m , . / Shift

The virtual keyboard can be used in conjunction with your keyboard. The value of the key will be entered by clicking on a key or when the cursor is over the key for 2 seconds.

This is a U.S. Federal Government owned computer system, for the use by authorized users only. Unauthorized access violates Title 18, U.S. Code Section 1030 and other applicable statutes. Violations are punishable by civil and criminal penalties. Use of this system implies consent to have all activities on this system monitored and recorded, which can be provided as evidence to law enforcement officials.

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Figure 11 – School Coordinator Login Screen

This screen is used by School Coordinators to access the screens used to approve/reject access requests and to manage approved users (see Section 5.3). Enter your User ID and password and then click the 'Submit' button. If you provided the correct User ID and password, the Experimental Sites School Coordinator Home screen will load (see Figure 12).

Experimental Sites School Coordinator Home >> Display Pending Requests

The following are user requests for Experimental Sites access to your school. Each row is its own request and must be individually approved or denied. Click the link in the "Subject" column to view details of the request, and to approve or deny it.

[Filter Display](#) (filter is currently **Off**)

Subject	Date Submitted	School OPEID
Jane Doe	Mon Aug 06 13:02:30 EDT 2007	00396900

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Figure 12 – Experimental Sites School Coordinator Home Screen

By default, this screen lists all pending access requests. Clicking on the requestor's name will load the Request Detail screen. This screen lists the information provided by the requestor during the registration process. All information, except for the requestor's password, last 4 Social Security Number digits, and security questions, is displayed on this screen.

Supervisor Information

First and Last Name:	me
Work Email Address:	test@test.edu
Work Phone Number:	1231231234
Work Phone Ext:	

Access Requested

School OPEID:	99999998
School Name:	Test2 University
School Location:	300 North Beaty Street
Selected Role:	SCHOOL USER

Approve / Reject Request

☐ Approve ☐ Reject

Comments

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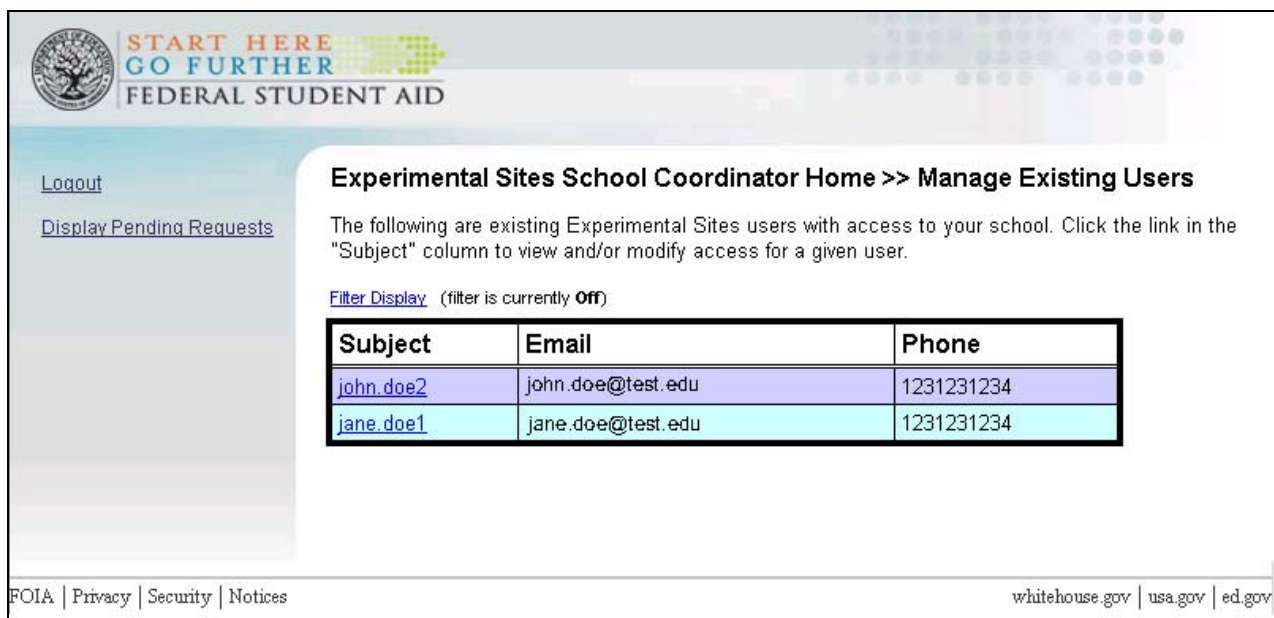
Figure 13 – Request Detail Screen (bottom half)

The bottom of the Request Detail screen (see Figure 13) has a space to approve/reject the request. Select the radio button to the left of the desired action, enter any comments (optional) into the space provided and then click the ‘Submit’ button. The School Coordinator Home screen will load. The approved/rejected request will no longer be in the list of pending requests.

The requestor will receive an e-mail notifying them of the approval or rejection. The e-mail will also contain the comments entered on the Request Detail screen. If approved, the requestor will receive a second e-mail containing their SA User ID. Once they receive that e-mail, the approved requestor will be able to login to the Experimental Sites Annual Reporting Tool.

5.3 Modifying a User’s Access

School Coordinators have the ability to view and to revoke user access to their school. To do so, login to the Experimental Sites School Coordinator Home screen (as described in Section 5.2). Once on the home screen, click the “Manage Existing Users” link (see Figure 12). This loads the Manage Existing Users screen (see Figure 14).



Experimental Sites School Coordinator Home >> Manage Existing Users

The following are existing Experimental Sites users with access to your school. Click the link in the "Subject" column to view and/or modify access for a given user.

[Filter Display](#) (filter is currently **Off**)

Subject	Email	Phone
john.doe2	john.doe@test.edu	1231231234
jane.doe1	jane.doe@test.edu	1231231234

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Figure 14 – Existing Users Screen

This lists all users from your school that have access to the Experimental Sites Annual Reporting Tool. If you click on the user's name, it will load the Existing User Detail screen (see Figure 15). This screen lists the demographic information of the selected user. The user's organization, contact information, and supervisor information is displayed.

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Experimental Sites School Coordinator Home >> Manage Existing Users >> User Details

The following are the user profile and access details for the given user. You can modify the user's access by clicking the "MODIFY" button below.

User Demographic Information

User Identity Information

First Name: Jane
Middle Name:
Last Name: Doe
Date of Birth: 1955-10-10

Organization Name and Address

Organization Name: test
Address #1: test
Address #2:
City: test
State: test
ZIP: 22222

Contact Information

Work Phone Number: 1231231234
Work Phone Ext:
Work Email Address: jane.doe@test.edu

Supervisor Information

First and Last Name: me
Work Email Address: supervisor@test.edu
Work Phone Number: 1231231234
Work Phone Ext:

Access Privileges

Total Schools: 1

MODIFY **PREVIOUS**

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Figure 15 – Existing User Detail Screen

Use the “Previous” button to return to the Existing Users screen. To remove the selected user’s access to the Experimental Sites Annual Reporting Tool, click the “Modify” button. This will load the Modify User Privileges screen (see Figure 16).

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View / Modify Access Privileges

The user's access is listed below.
Press the 'Delete School' button to remove the user's access for a school.
Press the 'Reset School' button to undo the changes you made.
Press 'Submit' to commit your changes to the system.
Press 'Cancel' to go back to user details without committing changes.

School

School OPEID: **00396900**
School Name: University of Minnesota - Twin Cities
School Location: 200 Fraser Hall
Minneapolis, MN 554550422
Change Status: Unchanged

User Role

School User

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Figure 16 – Modify User Privileges Screen

The Modify User Privileges screen lists the selected user's access. Clicking the "Delete School" button will update the "Change Status" field to "Pending Delete." To confirm the removal of the user's Experimental Sites access, click the "Submit" button. This will load the Existing Users screen. The selected user will no longer appear in the list of existing users and the user will not be able to login to the Experimental Sites Annual Reporting Tool.

When the "Change Status" field says "Pending Delete" clicking the "Reset School" button will undo the pending deletion. Using the "Cancel" button before clicking the 'Submit' button will also undo the deletion.

6. Logging In

To log into the Experimental Sites Annual Reporting Tool, click the "Login" link from the "Annual Reporting Tool" menu. To prevent unauthorized access to the reporting tool, the Federal Student Aid Login Screen will ask you to enter your User ID and password (see Figure 1). Once you enter your User ID and password, click "Submit." The system will verify that you are a registered user and that you are authorized to access your school's report. Once you have successfully logged in, your school's report page will load (see Section 7).

The Federal Student Aid Login screen contains a warning message indicating that you are accessing and using a United States Government computer network. By logging in to the application you acknowledge that you have read and understand the warning message.

A new feature of the Federal Student Aid Login screen is the virtual keyboard (see Figures 1 and 11). The virtual keyboard can be used to enter your User ID and password using your mouse instead of your keyboard. Virtual keyboard keys can be “pressed” by clicking them with your mouse or by hovering over the key with your mouse pointer for two seconds.

6.1 Changing Your Password

You can change your password at any time. To change your password, click the “Change Password” link on the Federal Student Aid Login Screen (see Figure 1). This will cause the Federal Student Aid Change Password Screen to load (see Figure 17). If you have recently been issued a temporary password, or if your password has expired, you will automatically be taken through this process.



Figure 17 – Change Password Screen

Once at the Change Password screen, complete each of the four fields on the screen. Enter your current password into the “Old Password” field. Enter your new password into the “New Password” field. Re-enter your new password into the “Verify New Password Field.” The passwords entered in the “New Password” and “Verify New Password” fields must match. After all fields have been completed, click the “Submit” button.

The Password Change Success Screen will load (see Figure 18). Your password has now been successfully changed. Clicking the “Click here to Return” link returns you to the Experimental Sites home page. You can now log in using your User ID and your new password.

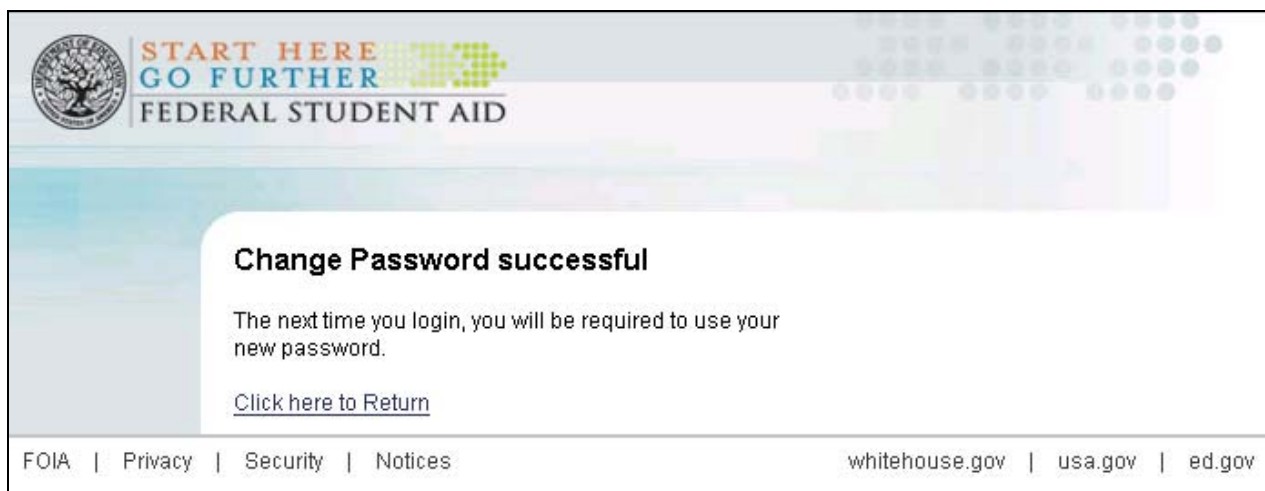


Figure 18 – Password Change Success Screen

6.2 Forgot Your User ID or Password

If you do not remember your User ID, contact Warren Farr at 202-377-4380 or ExperimentalSites@ed.gov. You will be provided with your User ID via e-mail or phone.

If you forgot your password, you can retrieve it online. To retrieve your password online, access the Experimental Sites Annual Reporting Tool as described in Section 3. Once the Federal Student Aid Login screen has loaded, click on the “Forgot Password” link. This loads a screen asking you for your SA User ID. Enter your User ID and click the “Submit” button. This loads the Federal Student Aid Challenge Screen (see Figure 19).



Figure 19 - Challenge Screen

The challenge screen will randomly present you with one of the challenge questions you entered during the registration process. Enter the answer to the question and click on the “Submit” button. This loads the Change Password screen shown in Figure 20.



Figure 20 - Change Password Screen for Forgot Password

Enter and confirm your new password and then click the “Submit” button. Your password has been successfully updated. The Password Change Success Screen now loads (see Figure 18). Clicking the “Click here to Return” link returns you to the Experimental Sites home page. You can now log in using your User ID and your new password.

6.3 Expiring Passwords

User passwords will expire every 90 days. When your password expires, you will be prompted to change your password when you attempt to log in. Section 6.1 describes how to change your password.

6.4 Password Lock-Out

As a system security feature, the online reporting tool log in screen will allow only three failed login attempts before the system automatically locks your account. If you attempt to login with your account locked, the following message is displayed: “Account has been locked.”

Your account will remain locked for 30 minutes after your last login attempt. During this period, you will not be able to login to the Experimental Sites Annual Reporting. If you attempt to login during the 30 minute period, the countdown will reset. After 30 minutes, you can attempt to login again. If you do not remember your password, use the process described in Section 6.2 to reset your password.

If your account does not unlock after 30 minutes, contact Warren Farr at 202-377-4380 or ExperimentalSites@ed.gov for assistance. You will be provided a new temporary password via e-mail. You will be prompted to change your password after logging in with the temporary password.

7. Annual Report Home Page

After you login, the online reporting tool will take you to the Annual Reports Home Page. The Home Page lists your school name, the award year for which you are reporting, and some information on using the site. The Home Page’s “Experimental Sites Worksheets Required” section lists the specific experiments in which your school is participating for the current year. This section can also be used to track your progress in completing your annual report. As each worksheet is completed, a check mark will appear beside the experiment. Once you have completed all of the worksheets, you can then submit your final annual report (see Section 11 for

additional details on submitting the report). In addition, the site contains a drop-down menu where you can access your prior award year reports (see Section 14 for additional details on this feature).

8. Accessing Worksheets

It's important to complete the Demographics worksheet first since the system must check some of the other worksheet data against this form. After completing the Demographics worksheet, you may complete your remaining worksheets in any sequence you prefer. The "Go to Worksheet" drop-down menu near the top of every page lets you "jump" directly to any worksheet. To access a worksheet, click on one of the experiments in the "Go To Worksheet" box's drop down menu and then click "Go." You can also access a worksheet by clicking on the worksheet's name in the "Experimental Sites Worksheets Required" section of the Annual Report Home Page.

9. Entering Worksheet Data

Once you open a worksheet page, your cursor will automatically appear in the first data entry field. You can go to a particular field by either using your mouse to click on a data field or by using the "Tab" key. You are not required to enter all of your worksheet data at one time. You can enter some data, save the worksheet, and then return to the worksheet at a later time (see Section 10 for additional details on saving a worksheet).

When completing the worksheets, there are several data elements that have specific range, sum, and/or cross-edit check requirements. The Data Dictionary lists each of these requirements where applicable. Please make sure to refer to the Data Dictionary as you are completing the worksheets (see Section 16 for additional details on accessing the Data Dictionary). Also, when you save your worksheet, the online reporting tool will automatically check your entered data to make sure it does not violate any range, sum, and/or cross-edit check requirements (e.g., number in field 1 cannot be greater than number in field 2). If there is an error, you will be returned to the worksheet and a red error message will be provided at the top of the worksheet. The error message will state ERROR and then provide a description of the error.

Lastly, almost all of the worksheets have comment boxes that must be completed before you can submit your report. When you open a worksheet, the system will automatically check to see if the worksheet's comment boxes are completed. If a comment box is not completed, the system will display a red notification message stating "[not entered]" above the comment button. You can save your worksheet data without entering data in the comment box. However, you will not be able to submit your report until all required comment boxes are completed. Once you enter comments in a comment box, the notification message will disappear.

10. Timeouts

The Experimental Sites online reporting tool will "timeout" your session if there has been no activity for 30 minutes. Inactivity means that the server has not been accessed for 30 minutes (i.e., you may have been typing in a worksheet, but if you have not saved or opened a new worksheet during the 30 minutes, you will be timed-out). Please note that if you are timed-out, you will lose any changes that were made since you last saved. For your security, we must ask you to log in again. Simply log in by entering your User ID and password.

11. Saving Worksheet Data

The Experimental Sites online reporting tool gives you the freedom to enter, save, and edit your worksheets at your convenience. In other words, you do not have to complete all your data entry

in a single session. To save a worksheet, click the “Save Data” button located near the bottom of the worksheet. The system will then check (1) the formats of some of the data elements (e.g., make sure there is no text in a number field) and (2) make sure the data elements do not violate any range, sum, and/or cross edit check requirements (e.g., number in field 1 cannot be greater than number in field 2). Some data elements in the experiment worksheets cannot be greater than data entered into the Demographic worksheet. When you save the worksheet, the system will also check for any of these data entry errors. If there is an error, you will be returned to the worksheet and a red error message will be provided at the top of the worksheet. The error message will state ERROR and then provide a description of the error. If you attempt to go to a new worksheet without correcting the errors, the system will notify you that you will lose your entered data and ask you if you would like to continue.

If there are no formatting or cross edit check errors within the worksheet, you will be returned to the worksheet and a red message will be provided at the top of the worksheet stating “Your data has been saved.” You can then continue your data entry. You can also exit the reporting tool by closing your browser or by clicking the “Logout” menu option. You can return to the reporting tool Home Page by clicking the “Annual Reports Home” button in the main tool bar. Finally, you can use the “Go to Worksheet” navigation box to select a new experiment.

When you save your worksheet, the system will also check to see if all required fields have been completed (this includes any required text boxes). If so, a check mark will be displayed next to the worksheet’s name on the reporting tool Home Page. This can serve as a useful reference for determining the status of your completed worksheets. **IMPORTANT NOTE:** If a check mark does not appear next to one of your worksheets, make sure you completed all required fields and text boxes. If a required text box has not been completed, the system will display a red notification message stating “[not entered]” above the comment button.

You can return to a saved worksheet at any time by selecting the worksheet in the “Go to Worksheet” navigation box and clicking “Go.” When the system opens the worksheet, it will automatically retrieve your saved data.

If you attempt to go to a new worksheet without saving your current worksheet, the system will prompt you to save the worksheet. **IMPORTANT NOTE:** If you close your web browser or click your web browser’s “Back” button without saving your current worksheet, you will lose any unsaved data.

12. Submitting Your Completed Report

Once you have completed all of your school’s worksheets, you can then submit your school’s annual report to the Department of Education. The reporting tool Home Page will also display check marks next to those worksheets that have been completed (i.e., all of the worksheets’ required fields have been completed). You can use the Home Page to verify that all of your worksheets are complete before submitting your annual report.

To submit your annual report, return to the reporting tool Home Page and click the “Submit Report” button. The reporting tool will verify that all required fields have been completed. If there are any incomplete fields, you will be provided with a dialog box stating that your report could not be submitted because one or more worksheets are incomplete. The dialog box will also refer you to the list of worksheets on the reporting tool Home Page. Those worksheets that do not have a check mark after their name are not complete (i.e., have some missing data).

After verifying that all of your worksheets are completed, the reporting tool will also run a final check to make sure the data elements do not violate any range, sum, and/or cross edit check requirements (e.g., number in field 1 cannot be greater than number in field 2). If there are any remaining data entry errors, the tool will return you to the Home Page and a red error message will be provided at the top of the worksheet. The error message will state “ERROR: The following data entry errors have been identified and must be corrected before your report can be submitted.” The error message will also provide a list of the worksheets with the data entry errors so that they can be corrected.

Once the system verifies that all of your worksheets were completed and that there are no data entry errors, then your report will be submitted to the Department of Education. The reporting tool will provide you with an immediate confirmation that your report was submitted. You will be able to print this confirmation page for your records.

IMPORTANT NOTE: Once your report is submitted, you will NOT be able to make any additional changes, or edit the report or the worksheets. As a result, it is important that you make sure that all data elements are final before you submit your report. You will be able to print your annual report and individual worksheets after the report is submitted (see Section 13 for additional details on printing). If you determine that you need to make additional changes to your submitted report, contact Warren Farr at 202-377-4380 or ExperimentalSites@ed.gov. The Experimental Sites team will then unlock your submitted report, so that you can make any final changes.

13. Printing Your Worksheets and Annual Report

You can print your worksheets by experiment or your entire annual report at any time. To print an individual worksheet, open the worksheet by using the “Go To Worksheet” navigation box or by clicking on the worksheet’s name in the Annual Report Home Page and then click the “Printer Friendly Version” button. You will then be presented with a printer-friendly view of your worksheet. To print the worksheet, click “Print.” Once the worksheet is printed, click the “Return” button to return to the data entry form.

Once you submit your annual report, you will still be able to print an individual worksheet. When you open a worksheet using the “Go to Worksheet” navigation box or by clicking on the worksheet’s name in the Annual Report Home Page, you will be automatically taken to the printer-friendly view of the worksheet. To print the worksheet, click “Print.” Once the worksheet is printed, click the “Return” button to return to the reporting tool Home Page.

To print your entire annual report, go to the reporting tool Home Page and click the “Printer Friendly Version” button. You will then be presented with a printer-friendly view of all of your worksheets. To print the report, click “Print.” Once the report is printed, click the “Return” button to return to the Home Page.

14. Accessing Prior Award Year Worksheets/Reports

From the Annual Report Home Page, you can access your prior year worksheets. Underneath your school’s name, you will see a drop-down menu called “Reporting Year.” To view your prior award year data, select a particular year from the drop-down menu. The screen will then change to the award year that you selected and will list your school’s experiments for that year. Please note that you will only be able to view and print your prior year worksheets and report (this reminder will appear at the top of your screen). Reports from prior years cannot be altered.

To print an individual worksheet, open the worksheet by using the “Go To Worksheet” navigation box or by clicking on the worksheet’s name in the Annual Report Home Page. You will be automatically taken to the printer-friendly view of the worksheet. To print the worksheet, click “Print.” Once the worksheet is printed, click the “Return” button to return to the reporting tool Home Page.

To print your entire annual report, go to the reporting tool Home Page and click the “Printer Friendly Version” button. You will then be presented with a printer-friendly view of all of your worksheets. To print the report, click “Print.” Once the report is printed, click the “Return” button to return to the Home Page. If you’d like to access the Data Dictionary for the award year you selected, click on the Data Dictionary link at the top of the page.

To return to the current award year report, select the current year from the “Reporting Year” drop-down menu.

15. Logging Off / Exiting the Reporting Tool

You can exit the Experimental Sites Annual Reporting Tool at any time by clicking “Exit” in the main tool bar. You will then exit the tool and be sent to the Experimental Sites home page. You can then close your browser or navigate to another site.

If you return to the Experimental Sites Annual Reporting Tool within 30 minutes of leaving during the same browser session (i.e. you do not close your browser window and open a new window) you will be able to directly access the Experimental Sites Annual Reporting Tool without logging in again. Closing your browser window after exiting will fully log you off.

16. Data Dictionary

Two Data Dictionaries have been developed for the Experimental Sites annual report. The Data Dictionaries provide detailed descriptions of each worksheet’s data elements and tips on how to complete each item, including any specific range, sum, and/or cross edit check requirements. The first Data Dictionary includes information on the Demographics worksheet and the following seven experiments:

- Loan Proration
- Overaward Tolerance
- Loan Fees in Cost of Attendance
- Credit of Title IV Aid to Institutional Charges
- Credit Title IV Aid to Prior Term Charges
- Entrance Loan Counseling
- Exit Loan Counseling.

The second Data Dictionary includes information on the Demographics worksheet and the Ability to Benefit experiment.

The Data Dictionary can be accessed from the main tool bar by clicking “Data Dictionary.” Depending on whether or not your school participates in the Ability to Benefit experiment, the system will retrieve the appropriate Data Dictionary for your school (remember that if you are accessing prior award year data and click on the Data Dictionary link, you will be provided with that year’s Data Dictionary). The Data Dictionary will be an Adobe PDF file. If you do not have Adobe Acrobat, a link to the Adobe home page where you can download a reader is provided on

the Annual Reporting Tool Browser Requirements page. Once you open the Data Dictionary, you can print it by clicking “File” and then “Print” in the Adobe main tool bar.

17. User Guide

This User Guide can be accessed from the main tool bar by first clicking the “Annual Reporting Tool” link and then clicking the “User Guide” link. The User Guide will be an Adobe PDF file. If you do not have Adobe Acrobat, a link to the Adobe home page where you can download a reader is provided on the Annual Reporting Tool Browser Requirements page. Once you open the User Guide, you can print it by clicking “File” and then “Print” in the Adobe main tool bar.

18. Contact Us

The Contact Us page provides you with contact information for assistance/questions in completing your annual report. To access the Contact Us page, click the “Contact Us” button on the main tool bar. The contact information provided can also be used to let us know what you think about using the online reporting tool and if there are any ways that we can improve our service.

19. Privacy

Information about the Department of Education’s privacy policies can be found by clicking on the “Privacy” link found in the footer of any page. Clicking the “Privacy” link will load the Department of Education’s Privacy Policy page.

20. Questions/Contacts

If you have any questions on completing your annual report or on using the online reporting tool, please contact Warren Farr at 202-377-4380 or ExperimentalSites@ed.gov.